

CHOOSING THE RIGHT COLLECTIONS MANAGEMENT SYSTEM

5 STEPS TO AN EFFECTIVE SELECTION PROCESS



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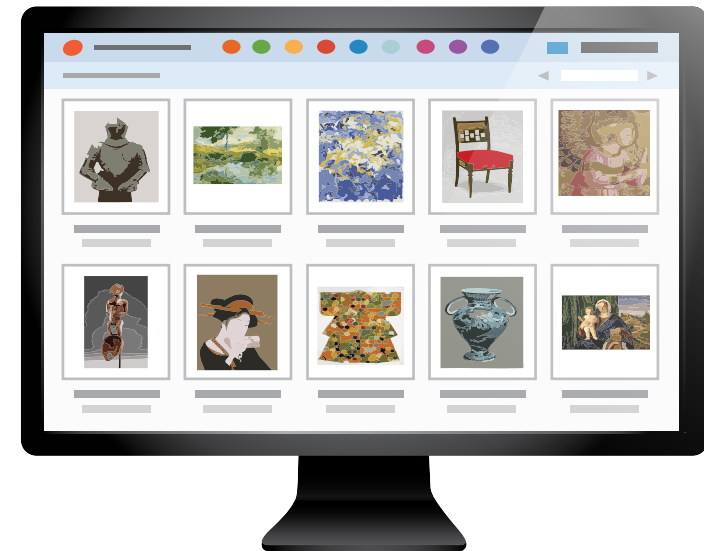
5 STEPS TO AN EFFECTIVE SELECTION PROCESS

Whether you are making your first Collections Management System (CMS) purchase or have outgrown your existing solution, your CMS is a crucial tool that can influence every department within your organization, and is central to many collection care processes.

The benefits of a robust, flexible CMS include:

- More efficient and productive use of resources and staff time
- Enhanced workflow and operational transparency
- Better interdepartmental collaboration among staff
- Increased accessibility to the collection for staff and your communities
- Better collection care by having all conservation information and images available digitally
- Better adherence to collections management standards
- Established ground work for future growth

As with all major decisions, research and preparation is the key to a successful outcome. We've compiled a few guidelines to help make the task easier.



STEP 1.

IDENTIFY YOUR SELECTION TEAM

Determine who will be the power users of the software and involve them in the selection process early on. They will be the ones helping to implement, maintain and work with the CMS database, so getting their insight and buy-in is critical.

As a suggestion, your selection committee should consist of (but is not limited to) the following:



KEY TEAM MEMBERS:

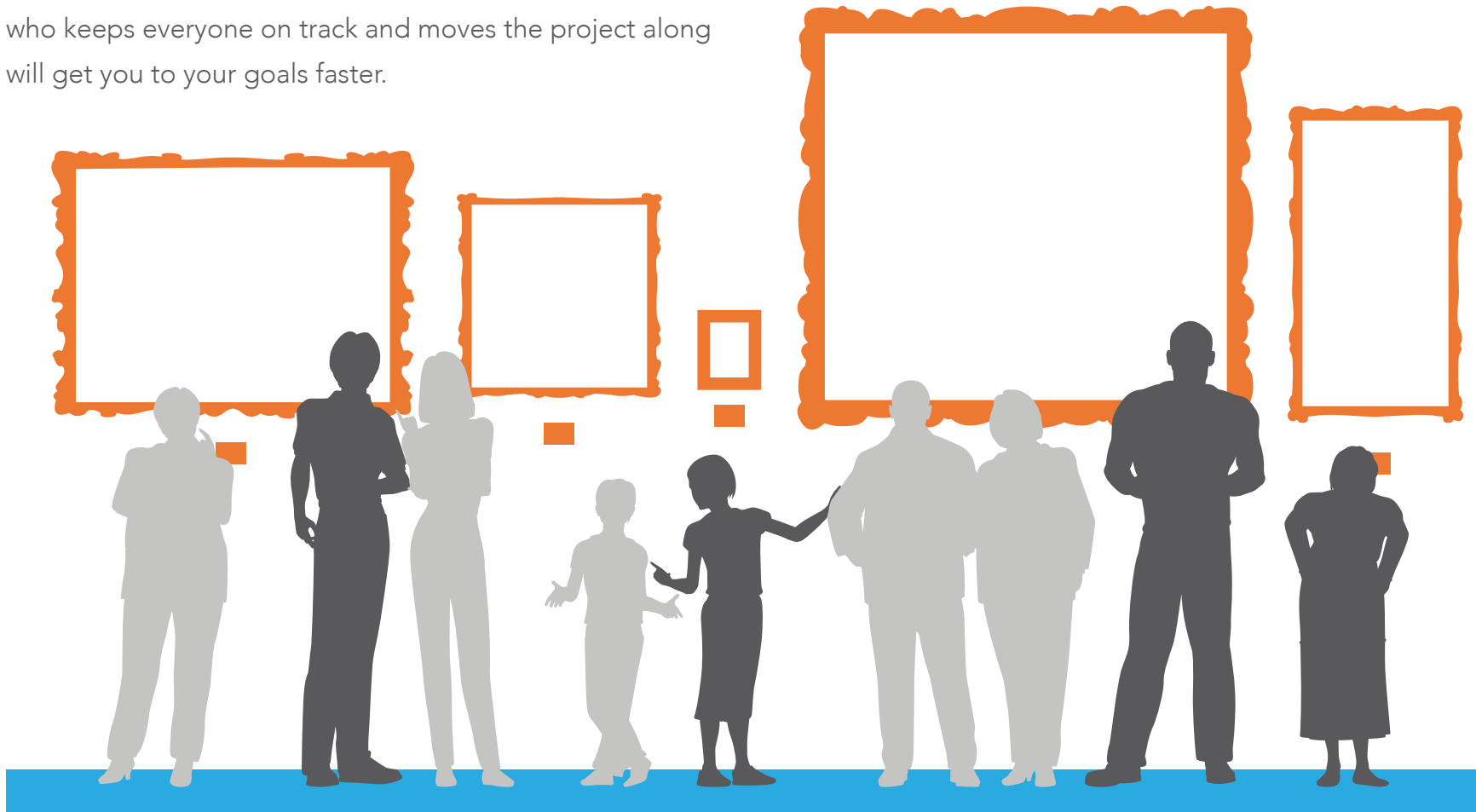
- Collection Manager/Head of Collections
- Head Registrar
- Executive Director
- IT Manager
- Head Curator
- Head of Conservation
- Database Administrator

OTHER SUGGESTED TEAM MEMBERS:

- Exhibition Manager
- Digital Media Specialist
- Education Manager
- Webmaster
- Marketing Manager
- Content Specialist

STEP 2.**SELECT A PROJECT LEADER AND ESTABLISH A PLAN**

Once you have determined your team players, it's important to select a CMS project team leader. A structured and coordinated selection process led by a project manager who keeps everyone on track and moves the project along will get you to your goals faster.



STEP 3.

INTERVIEW KEY STAKEHOLDERS TO DETERMINE NEEDS

For a CMS that meets your needs, you first have to establish what those needs are. These will be different for every institution and will provide the framework for your CMS wish list. Here are some key questions the project leader should ask their project team:

EXAMINE EXISTING PROCESSES

- In terms of your current collection data workflow, how do you spend most of your time?
- What are the pain points of your current processes? What isn't working?
- What are your process redundancies? Where does time get wasted?
- What desired tasks are you unable to complete with your current solution?

DETERMINE THE REQUIREMENTS OF A NEW CMS SOLUTION

- Review your institution's mission. How do you envision a new CMS solution helping you achieve your goals?

- What problems do you hope to solve with a new CMS?
- Do you need to present your collection to the public via the web?
- How important is Digital Asset Management to your collections management? Does this functionality need to be integrated with the new CMS? Does the system need to support all the media formats you work with?
- How much IT support will you need to implement a new system and to sustain your workflows following implementation?
- What is your budget?

Now that you have asked the important questions, compile the findings and identify the needs that continually surface to know what the priorities are for a new system. You can then bring these needs to the forefront when researching vendors and in conversation with them.

YOUR REQUIREMENTS WISH LIST

Here is an example of a worksheet layout to help better determine your CMS needs:



| Requirements | Users | Use Cases |
|---------------------------------------|---|--|
| 1. Online Access | General public/researchers | Greater object information/promoting institution/speedier research processes |
| 2. Shipping Management | Registrars | Expedite exhibitions & loans, better object tracking for improved security |
| 3. Location Management | All internal users | Better object tracking for improved efficiency |
| 4. Digital Asset Management | Archivists, Web Specialists, PR/Marketing, Digital Imaging Specialist, Conservators | More accurate, controlled usage of collection images and media |
| 5. Web Sharing/Publishing | Education, Web Specialists, Collections, public, researchers | Share collection online easily via a web interface without needing a separate database |
| 6. Hardware Requirements and Upgrades | All users and managers of the database | User-based security settings by individual and department |

STEP 4.

VENDOR RESEARCH

A good vendor not only delivers a CMS that fits the bill, but also backs it up with sound client care and support. Look for a vendor you can enter into a partnership with, one who will listen to and understand your needs. Questions to ask in your vendor research include:

- Is the vendor well established? How long have they been in business?
- How well do they understand the specific needs of the museum and collection communities?
- Do they have experience in your type and size of collection?
- Who are the vendor's clients? What do they have to say about the system and the support delivered by the vendor?
- What is the vendor's approach to service and support?
- How compatible is the new software with your existing IT infrastructure?
- What are the costs of implementation? Are there yearly costs? Are there extra support costs? Are there extra costs for service packs and upgrades?



EXPLORING THE FEATURES

You should look for a solution that does more than simply document the objects you have in your collection. Your CMS may need to handle exhibitions, shipping and loans, complex searches across many fields of data, conservation data, and web publishing. Here are some key features to look for in a new CMS.

Exhibition Management

Look for a CMS that can help plan and manage exhibition and display programs, consolidating all object and checklist information to ensure staff working on the exhibition have access to the same up-to-date information. A good system also lets you easily export that information out of the CMS and into Excel, Word or PowerPoint documents for sharing with partnering institutions. Your exhibition functionality should integrate with other related features such as loans and shipping.

Loan Management

The best CMS solution will manage both outgoing and incoming, including multiple loan agreement forms, lender receipts and other documentation.

Curatorial Support

Ensure that your CMS can model the workflow of curatorial staff to support complex processes. Look for a system that supports high-resolution images and has visual image views so curators can choose how they want to view objects. Curators should be able to easily export images, exhibition and object notes directly into Excel, PowerPoint or Word to support their documentation requirements. It is also important that curators can easily manage borrower and lender information with the system.

Shipping Management

Look for a CMS that can cross-reference information on shipping dates, courier details, and the shipment's value, with insurance, object, and exhibition or loan details. You should also be able to generate shipping reports and lists of objects containing images for your art handlers. Your CMS must be able to track and manage insurance policies for each object, even when in transit to other exhibitions.

Conservation Information

Your conservation department can be among the heaviest users of your new CMS. Conservators must be able to track conservation processes, treatment data, surveys, and reports, as well as manage the large number of images generated through their daily work.

Digital Asset Management (DAM)

A robust CMS with DAM functionality will allow you to read and manage virtually any media file format, easily create media records, tag files, and automatically import and update media metadata. You should be able to control access to images at different resolutions, digitally annotate images, set group access rights, and link media to their corresponding objects.

Thesaurus/Lexicon Management

It is critical that your new CMS lets you accurately track your collection terms with easily configurable attributes, and a dynamic, integrated thesaurus. This is most important for standardizing collection information and data entry, and supports enhanced findability of your collection objects on the web.

Specialized Usage

Consider whether any of the objects in your collection will have specialized cataloguing requirements and ensure your new CMS is flexible enough to manage those requirements. For example, do you have double-sided objects or artworks where you need to catalogue the recto and verso? How about managing objects with multiple components such as a teapot and its lid or a pair of shoes, or possible exhibitions that include video and time-based media? Do you have archival information that needs to be catalogued and linked to other objects in your collection? What new types of objects might your collection receive in the future?

Reporting Flexibility

To improve staff efficiency, look for a CMS that provides multiple pre-configured reports, labels, catalogue templates, condition reports and exhibition checklists. Ensure that this information can easily be exported to Word, Excel or PowerPoint and other desired formats. Your CMS should also support custom report design as needed.

Multilingual Functionality

Your CMS should be able to display information and support searches in multiple languages.

Digitization

If you are going to be digitizing parts of your collection, look for a CMS that integrates with a web-based application that can publish your digital information to your website and/or intranet so you don't have to maintain separate databases. Your CMS should also be capable of reading and indexing the contents of text-based PDF and Word documents.

Configuration

Your new CMS should include flexible, user-configurable fields and forms so you can easily create data entry forms and workflow-control fields tailored to your specific processes and collection type.

Remember: The new system shouldn't simply replace the old one, but should help your institution grow and support your collection long into the future.

FOLLOW-UP TASKS

- Evaluate your core requirements and hardware needs.
- Keep abreast of best practices. Attend conferences to stay current on important collection care discussions. Subscribe to Collections Management and Museum blogs.
- Consolidate the results of your surveys and interviews to refine your focus.
- Use your findings to identify your top CMS options.
- Educate yourself and your team. Arrange for the vendor to provide guided demonstrations or personal demos to get a realistic view of the software.
- Visit organizations that currently use the systems on your vendor shortlist. They are most likely to give you an unbiased review.

STEP 5.

EVALUATE THE RESULTS

In addition to all of the desired feature requirements, you can't overlook the bottom line. It's important to weigh the CMS' benefits and services against your return on investment.

RETURN ON INVESTMENT ANALYSIS

A return on investment analysis of CMS solutions can give you a big picture view of the project. First identify all of the costs associated with a given CMS, then identify all benefits, both monetary and non-monetary. Remember costs and benefits such as:

| Costs |
|-----------------------------|
| Initial software purchase |
| Hardware needed |
| Implementation fee |
| Data conversion |
| User licenses |
| System add-ons and upgrades |
| Ongoing maintenance |
| Training |
| Hosting |

Remember: The system's price shouldn't be your only determining factor. The quality of the CMS and the company backing has a critical place in your decision process. In the long run, a well-supported system will end up saving you money in the form of staff time and more efficient workflow processes.

| Benefits |
|---|
| Improved operational efficiency |
| Consolidated, up-to-date data |
| Better use of staff time |
| Faster onboarding of staff/interns |
| Better object preservation and security |
| Broader audience and greater understanding of collections |
| Less stressful work environment |
| More efficient exhibition planning |
| Enhanced workflow processes |

The following grid can help you determine your needs vs. costs, clearly.

| COSTS | Gallery Systems | Vendor 2 | Vendor 3 |
|---|-----------------|----------|----------|
| What is the baseline cost for one user license? | | | |
| Are user licenses concurrent? | Y/N | Y/N | Y/N |
| What is the standard implementation fee? | | | |
| Are Conversion & Data Mapping Services offered? | Y/N | Y/N | Y/N |
| Is user training included with purchase? | Y/N | Y/N | Y/N |
| What is the cost of additional training? | | | |
| Is the application accessible remotely? Can it be hosted? | Y/N | Y/N | Y/N |
| What are the hosting fees? | | | |
| Is customer support offered? | Y/N | Y/N | Y/N |
| What are the annual maintenance & support fees? | | | |
| Can the application manage digital assets? | Y/N | Y/N | Y/N |
| Does the vendor offer an integrated DAM system? | Y/N | Y/N | Y/N |
| Estimated costs for recommended hardware upgrades or requirements | | | |
| What are the IT requirements? | | | |

FOLLOW-UP TASKS

- Analyze the cost and benefits of each CMS choice.
- Request and evaluate references from each vendor.
- Arrange for further demonstrations/conversations with your top choices.

CMS SELECTION CHECKLIST

This worksheet will help the project manager maintain a high-level overview of the steps in the selection process:

| CMS Selection Checklist | |
|---|---------------|
| Step 1. Identify the Selection Team | Status |
| Choose the members of your selection team | |
| Step 2. Designate your Project Leader & Establish a Plan | Status |
| Select a project leader | |
| Outline your progress roadmap | |
| Step 3. Conduct Key Stakeholder Interviews | Status |
| Interview stakeholders and potential end-users | |
| Compile and refine your findings and list of requirements. | |
| Step 4. Vendor Research | Status |
| Interview vendors and research offerings | |
| Explore CMS features: request online and in-depth personal demonstrations | |
| Create a shortlist of potential solutions | |
| Step 5. Evaluate Results | Status |
| Compare and analyze costs and benefits for top solutions | |
| Evaluate client references from each vendor | |
| Ask for additional demonstrations and interviews with chosen vendors to solidify choice | |
| Finalize vendor selection | |

ADDITIONAL COLLECTIONS MANAGEMENT RESOURCES

- **Registrars Committee of AAM (RC-AAM)**
<http://www.rcaam.org/>
- **Association of Registrars and Collection Specialists (ARCS)**
<https://www.arcsinfo.org/>
- **Collections Trust**
www.collectionstrust.org.uk
- **Museums and Heritage**
www.museumsandheritage.com
- **Museums and the Web**
<http://www.museumsandtheweb.com/>
- **Museums Computer Network (MCN)**
www.mcn.edu
- **Cataloguing Cultural Objects**
<http://cco.vrafoundation.org/>
- **American Institute of Conservation**
<http://www.conservation-us.org/>



MAKING YOUR CHOICE

The right CMS can open your collections to new audiences, help staff do their jobs more efficiently, and support your institution into the future. Taking the time to determine your needs, and researching the various solutions that best match, will save time, money, and frustration.

If you'd like to learn more on how Gallery Systems can help you reach your goals, view a CMS demonstration, or request a consultation with one of our representatives, contact us at www.gallerysystems.com/contact

